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TVB

A RESEARCH TREND REPORT

TRENDS

IN VIEWING

Prepared by the TVB Research Department

2/91

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TRENDS IN VIEWING

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Highlights

* The average hours of TV usage during 1990 were 6 hrs. 53 min. per TV home per day, down 8 minutes from the 7:01 posted during 1989. *See Caution Below.* (page 3)

* Over-the-air television continues to account for the lion's share of household viewing. During 1990, 76% of all viewing was to over-the-air television. (page 4)

* Over-the-air viewing remains high even in pay cable households where the majority of the viewing is still to over-the-air stations. (page 5)

* On an average basis, household TV viewing topped the five hour mark for the first time in 1956 with a 5 hrs. 1 min. daily average. Fifteen years later (1971) the six hour level was reached with a 6:02. Twelve years later (1983) the seven hour mark was topped with a 7:02. (page 7)

* The target demographic featured in this issue is Men 25-54 and 35-64 in households $40,000+ where the head of household is a Professional, Owner or Manager. This group of affluent professionals averages more than 3 hours per day watching TV. (Page 8)

CAUTION: During the first half of 1990, particularly during the February - April period, viewing levels as reported by the A.C. Nielsen Co. were showing significant declines. To date, neither Nielsen nor other industry sources have an explanation for these declines. Nielsen will continue to investigate this phenomenon. May and June viewing appears to be returning to "normal" levels.

HOURS OF TV USAGE

Per TV Home Per Day

	1983	1984	1985	1986	1987	1988	1989	1990
Jan	7:38	7:53	**7:58**	7:52	7:50	7:44	7:37	7:28
Feb	7:33	7:38	**7:49**	7:48	7:35	7:38	7:32	7:16
Mar	7:16	**7:31**	7:20	7:26	7:26	7:20	7:24	7:00
Apr	**7:19**	7:17	7:04	7:07	7:05	6:54	7:02	6:47
May	6:39	**6:45**	6:36	6:44	6:40	6:42	6:43	6:35
Jun	6:23	6:30	**6:41**	6:31	6:35	6:28	6:31	6:27
Jul	6:23	6:26	6:34	**6:37**	6:32	6:31	6:27	6:24
Aug	6:25	**6:46**	6:41	6:35	6:31	6:33	6:34	6:38
Sep	6:41	6:45	6:54	6:49	6:36	**7:04**	6:50	6:49
Oct	6:59	7:07	**7:11**	7:08	6:52	7:01	6:56	6:54
Nov	7:30	7:26	**7:37**	7:27	7:10	7:18	7:17	7:07
Dec	**7:37**	7:27	7:34	7:28	7:15	7:20	7:23	7:09
Yearly Average	7:02	7:08	**7:10**	7:08	7:01	7:03	7:01	6:53

All Time High

Note: **Data prior to Sept.'87 based on NTI Audimeter sample. From Sept.'87 data based on NTI People Meter sample.**

Source: A.C. Nielsen

Average Time Spent Per Household Per Day

		Over Air	Chg.*	% of Total	Cable Orig.	Chg.*	% of Total	Pay Cable	Chg.*	% of Total
1988	Jan	6:52	-16	83	:52	+9	11	:30	+6	[illegible]
	Feb	6:49	- 1	84	:52	+6	11	:27	+4	[illegible]
	Mar	6:33	- 7	83	:52	+7	11	:29	+5	6
	Apr	6:01	-13	83	:49	+4	11	:27	-	6
	May	5:53	+ 5	82	:49	+6	12	:27	+3	6
	Jun	5:33	-11	81	:48	+2	12	:30	+4	7
	Jul	5:28	-5	79	:52	+4	13	:33	+4	8
	Aug	5:33	0	80	:52	+3	12	:32	+3	8
	Sep	5:54	+11	81	:53	+8	12	:30	+4	7
	Oct	6:06	- 6	82	:53	+13	12	:27	+1	6
	Nov	6:19	- 5	81	:59	+14	13	:29	+2	6
	Dec	6:23	-	81	:59	+11	13	:29	-	6
Average		6:07	- 4	82	:53	+8	12	:29	+3	6
1989	Jan	6:30	-22	81	1:03	+11	13	:31	+1	6
	Feb	6:30	-19	81	1:02	+10	13	:29	+2	6
	Mar	6:22	-11	80	1:05	+13	14	:29	-	6
	Apr	6:00	- 1	80	1:03	+14	14	:27	-	6
	May	5:41	-12	80	1:00	+11	14	:27	-	6
	Jun	5:21	-12	78	1:02	+14	15	:29	-1	7
	Jul	5:14	-14	77	1:03	+11	15	:32	-1	8
	Aug	5:18	-15	77	1:05	+13	16	:30	-2	7
	Sep	5:38	-16	78	1:05	+12	15	:29	-1	7
	Oct	5:56	-10	80	1:05	+12	14	:26	-1	6
	Nov	6:12	- 7	79	1:11	+12	15	:27	-2	6
	Dec	6:07	-16	78	1:15	+16	16	:29	-	6
Average		5:54	-13	79	1:05	+12	15	:29	-	6
1990	Jan	6:16	-14	78	1:16	+13	16	:30	-1	6
	Feb	6:00	-30	78	1:13	+11	16	:30	+1	7
	Mar	5:47	-35	77	1:12	+7	16	:30	+1	7
	Apr	5:31	-29	77	1:12	+9	17	:29	+2	7
	May	5:21	-20	77	1:11	+11	17	:27	-	7
	Jun	5:10	-11	75	1:13	+11	18	:29	-	7
	Jul	5:02	-12	75	1:13	+10	18	:29	-3	7
	Aug	5:11	-7	74	1:22	+17	19	:29	-1	7
	Sep	5:25	-13	76	1:18	+7	18	:27	+1	6
	Oct	5:38	-18	77	1:18	+13	18	:26	-	6
	Nov	5:53	-19	77	1:19	+8	17	:26	-1	6
	Dec	5:47	-20	76	1:22	+7	18	:26	-3	6
Average		5:35	-19	76	1:16	+8	17	:28	-	7

*** Change in number of minutes from the same month of the previous year.**

Note: **Date prior to Sept. '87 based on NTI Audimeter sample. From Sept. '87 data based on NTI People Meter sample.**

Source: **A.C. Nielsen (NTI) Cable TV - A Status Report**

Television Usage Per Week
By Cable Status of TV Households

	Non-Cable (40.0% of TVHH) Wkly Hrs.	Share	Basic Cable (28.9% of TVHH) Wkly Hrs.	Share	Pay Cable (31.1% of TVHH) Wkly Hrs.	Share	TV Households (100.0% of TVHH) Wkly Hrs.	Share
Total*	43:37	100	48:25	100	59:32	100	49:44	100
Affiliates**	30:16	69	25:26	52	26:47	45	27:43	56
ABC	9:54	23	8:22	17	9:17	16	9:14	19
CBS	10:38	24	8:49	18	8:46	15	9:35	19
NBC	9:38	22	8:11	17	8:35	14	8:54	18
Ind. Com'l	13:02	30	10:04	21	12:19	21	11:56	24
Super Sta.	2:17	5	3:56	8	4:31	8	3:32	7
Local	10:07	23	5:09	11	6:49	12	7:34	15
Distant	:38	2	:59	2	:58	2	:50	2
Public	1:53	4	1:29	3	1:10	2	1:31	3
Cable Orig.	-	-	13:53	29	15:41	26	9:14	19
Pay Service	-	-	-	-	9:41	16	3:01	6

* **Sum of the parts exceed the total because of simultaneous viewing.**

** **Sum of the network is less than the total because viewing to multi-affiliates is included in the total.**

Source: **A.C. Nielsen (NTI) Monthly Cable Status Report - November 1990**

HOURS OF TV USAGE
Per Person Per Day

		1983	1984	1985	1986	1987	1988	1989	1990
Men 18+	Jan	--	--	--	--	--	**4:40**	4:27	4:23
	Feb	4:23	4:21	4:21	4:20	4:14	**4:25**	4:18	4:12
	Mar	4:11	4:11	4:07	4:07	4:05	4:08	**4:13**	3:58
	Apr	4:08	3:59	3:54	3:47	3:47	3:51	3:56	3:47
	May	3:38	3:43	3:34	3:41	3:35	3:42	**3:43**	3:40
	Jun	--	--	--	--	--	3:30	**3:32**	3:29
	Jul	3:26	3:22	**3:31**	3:29	3:27	**3:31**	3:30	3:23
	Aug	--	--	--	--	--	3:31	**3:32**	**3:32**
	Sep	--	--	--	--	--	**4:00**	3:52	3:51
	Oct	4:02	4:02	4:01	**4:04**	3:58	4:01	3:57	3:58
	Nov	**4:19**	4:09	4:18	4:06	4:08	4:10	4:11	4:06
	Dec*	4:21	4:16	4:12	4:12	4:15	4:14	4:19	3:58
Women 18+	Jan	--	--	--	--	--	**5:24**	5:11	4:59
	Feb	5:01	5:09	**5:21**	**5:21**	5:12	5:17	5:06	4:47
	Mar	4:47	5:00	4:57	5:01	**5:04**	5:00	5:01	4:35
	Apr	4:47	4:52	4:49	4:48	**4:53**	4:38	4:40	4:25
	May	4:21	4:33	4:29	4:33	**4:34**	4:29	4:28	4:17
	Jun	--	--	--	--	--	4:11	**4:13**	4:07
	Jul	4:05	4:09	4:24	**4:33**	4:18	4:10	4:08	4:04
	Aug	--	--	--	--	--	4:08	**4:13**	4:11
	Sep	--	--	--	--	--	**4:39**	4:33	4:28
	Oct	4:37	4:47	**4:51**	4:50	4:40	4:40	4:36	4:31
	Nov	4:57	5:03	5:08	**5:09**	4:49	4:49	4:49	4:41
	Dec	5:00	**5:01**	**5:01**	4:59	4:52	4:50	4:49	4:31
Teens 12-17	Jan	--	--	--	--	--	**3:54**	3:27	3:17
	Feb	3:36	**3:47**	3:46	3:42	3:08	3:41	3:16	3:10
	Mar	**3:35**	3:31	3:16	3:13	2:52	3:25	3:11	2:59
	Apr	**3:40**	3:25	3:21	3:04	2:53	3:16	3:06	3:12
	May	**3:05**	3:01	2:47	2:45	2:45	3:00	2:43	2:59
	Jun	--	--	--	--	--	**3:15**	3:01	3:30
	Jul	4:05	3:53	3:54	**4:08**	3:22	3:35	3:33	3:45
	Aug	--	--	--	--	--	3:35	3:33	**3:50**
	Sep	--	--	--	--	--	**2:47**	2:40	2:55
	Oct	**3:21**	2:48	3:06	2:50	3:02	2:49	2:50	2:59
	Nov	**3:33**	3:13	3:22	3:00	3:24	3:08	3:07	3:19
	Dec	**3:36**	3:24	3:24	3:06	3:21	3:10	3:26	2:59
Children 2-11	Jan	--	--	--	--	--	**4:00**	3:56	3:48
	Feb *	3:54	4:03	4:25	4:02	3:40	3:50	3:57	3:43
	Mar	**3:57**	3:53	3:52	3:43	3:20	3:39	3:44	3:28
	Apr	**3:58**	3:47	3:47	3:24	3:15	3:19	3:29	3:22
	May	3:00	**3:20**	3:10	3:01	2:47	2:54	3:05	3:00
	Jun	--	--	--	--	--	2:54	**3:04**	3:11
	Jul	3:30	3:44	**3:47**	**3:47**	3:19	3:16	3:14	3:18
	Aug	--	--	--	--	--	3:20	**3:23**	3:22
	Sep	--	--	--	--	--	2:58	**3:01**	2:59
	Oct *	3:14	3:22	3:25	3:05	3:01	3:03	3:06	3:03
	Nov	3:41	3:54	**3:58**	3:45	3:25	3:28	3:38	3:20
	Dec *	3:53	3:58	3:56	3:36	3:37	3:43	3:55	3:03

All Time High

*** Record set prior to 1983**

Source: A.C. Nielsen (NTI)

Note: Data prior to Sept.'87 based on NTI Audimeter sample. From Sept.'87 data based on NTI People Meter sample.

TIME SPENT VIEWING
Per TV Home--Per Day
Annual Averages

1950	4 hr. 35 min.	1975	6 hr. 7 min.
1951	4 hr. 43 min.	1976	6 hr. 18 min.
1952	4 hr. 49 min.	1977	6 hr. 10 min.
1953	4 hr. 40 min.	1978	6 hr. 17 min.
1954	4 hr. 46 min.	1979	6 hr. 28 min.
1955	4 hr. 51 min.	1980	6 hr. 36 min.
1956	5 hr. 1 min.	1981	6 hr. 45 min.
1957	5 hr. 9 min.	1982	6 hr. 48 min.
1958	5 hr. 5 min.	1983	7 hr. 2 min.
1959	5 hr. 2 min.	1984	7 hr. 8 min.
1960	5 hr. 6 min.	1985	7 hr. 10 min.
1961	5 hr. 7 min.	1986	7 hr. 8 min.
1962	5 hr. 6 min.	1987	7 hr. 1 min.
1963	5 hr. 11 min.	1988	7 hr. 3 min.
1964	5 hr. 25 min.	1989	7 hr. 1 min.
1965	5 hr. 29 min.	1990	6 hr. 53 min.
1966	5 hr. 32 min.		
1967	5 hr. 42 min.		
1968	5 hr. 46 min.		
1969	5 hr. 50 min.		
1970	5 hr. 56 min.		
1971	6 hr. 2 min.		
1972	6 hr. 12 min.		
1973	6 hr. 15 min.		
1974	6 hr. 14 min.		

Per Person -- Per Day
Annual Averages

	Men	Women	Teens	Children
1988	3:59	4:41	3:18	3:22
1989	3:58	4:39	3:09	3:28
1990	3:51	4:28	3:15	3:18

Source: A.C. Nielsen Co.

Note: Data prior to Sept.'87 based on NTI Audimeter sample. From Sept.'87 data based on NTI People Meter sample.

Target Demo: **Men 25-54 and 35-64 in Households $40,000+ where HOH is a Professional, Owner or Manager**

Universe Estimate - Men 25-54 11,860,000
Men 35-64 10,130,000

Time Spent With TV Daily

Men 25-54/POM	3 hrs. 11 mins.
Men 35-64/POM	3 hrs. 22 mins.

TV Usage By Daypart [1]

		-----Avg. Minute % Viewing----- In $40,000+ HH Where HOH Is A POM			
		Men 25-54 [2]		Men 35-64 [2]	
		%	TDI	%	TDI
Mon-Fri	7am-10am	4.8	44	5.7	53
	10am-1pm	4.1	36	4.1	38
	1pm-4:30pm	5.1	35	5.4	38
	4:30pm-7:30pm	15.4	56	17.1	63
Mon-Sun	7:30pm-8pm	30.7	80	32.2	84
	8pm-11pm	38.5	96	39.6	99
	11pm-11:30pm	28.9	109	30.1	113
	11:30pm-1am	15.8	101	16.2	104
Sat	7am-1pm	7.9	61	8.4	65
	1pm-4:30pm	16.3	90	16.5	91
	4:30pm-7:30pm	24.3	95	25.0	98
Sun	7am-1pm	10.6	85	11.8	89
	1pm-4:30pm	26.9	115	27.5	118
	4:30pm-7:30pm	34.9	110	36.6	115

1 Based on EST, except EST+ 3 hours in Pacific Territory

2 Target Demo Index
The larger the index the greater the proportion of target demos to total viewers. (Persons 2+ = 100)

Source: A.C. Nielsen NTI/NAD Report, November 1990